

GLOBAL PATIENT TEMPERATURE MANAGEMENT MARKET FORECAST 2017-2025

<https://marketpublishers.com/r/GA3DE499189EN.html>

Date: March 2017

Pages: 136

Price: US\$ 2,500.00 (Single User License)

ID: GA3DE499189EN

Abstracts

KEY FINDINGS

Patient warming and cooling devices offer several benefits such as reducing loss of blood during surgeries, lowering the risks of neurological disorders post cardiac arrests, rapid recovery after surgeries, and decreasing risks of SSIs. The patient warming systems can be segmented into convective warming system, surface warming systems, and intravascular warming systems.

These benefits in turn reduce the stay at hospitals thus, lowering the healthcare costs by enhancing the healthcare infrastructure with the employment of patient temperature management devices. These health benefits offered by patient warming and cooling devices also help healthcare providers to lower the rate of readmissions significantly.

The Global patient temperature management market generated revenue of \$2.062 Billion in 2016 and is anticipated to contribute \$3.839 Billion by 2025, growing at a CAGR of 7.2% during the forecast period 2017-2025. The patient warming systems market accounted for a large share and is expected to witness the highest growth during the forecast period of 2017-2025. Patient temperature management systems are developed to administer and regulate patient's body temperature. The market for temperature management market is driven by the rapid rise in number of healthcare organizations adopting the temperature management system in multiple clinical applications and settings for the benefits of patient is likely to drive the market growth in future.

For Market size estimation, both Top down and bottom up methods to estimate and validate the size of the global market and the size of various other segments of the

patient temperature management market.

Source: Inkwood Research

With emerging Health organizations and Hospitals implementing patient warming devices, enormous market growth can be predicted. Some of the other reasons for the growth of patient temperature management market are rise in incidences of Nervous System and Cardiovascular Disorders, technological enhancements, development of mobile devices, Enhanced Healthcare Infrastructure and Conferences or Symposiums on Patient Temperature Management.

Temperature management solutions are used to maintain the normal body temperature for critically ill patients during surgical procedures. The patient temperature management market can be categorized on the basis of application areas such as acute care, newborn care, perioperative care, and others. The rise in number of healthcare organizations setting up standards or guidelines for the use of temperature management systems in maintaining normothermia during neurological and cardiac surgeries is likely to accelerate the growth of the market.

The patient temperature management products market can be segregated into perioperative care, acute care, newborn care, and other applications areas (military, physiotherapy, chemotherapy, and patient transport). The major share of perioperative care can be attributed to rise in demand for surgical procedures and adherence to the guidelines set by the NICE for adoption of patient warming systems in several indications.

MARKET INSIGHTS

The rise in cardiovascular disorders and the rise in healthcare organizations setting up standards for the use of temperature management are two driving factors responsible for the market growth. Also growing demand for warming systems and launching of more patient warming systems than patient cooling systems are expected to drive the market growth. Temperature management is used to prevent neurological damage after cardiac arrests. The rise in number of healthcare organizations setting up standards or guidelines for the use of temperature management systems in maintaining normothermia during neurological and cardiac surgeries is likely to accelerate the growth of the market.

Factors that will restrain market growth are the price pressures, product recalls and high

costs of IVTM systems.

REGIONAL INSIGHTS

North America accounts for the largest share of the market in 2016 and is expected to continue in the near future. This dominance can be attributed to a large number of surgical procedures that are taking place in the region. (US hold the largest share in the patient temperature management market.) Europe has the second largest share of market due to the development of new products.

Asia Pacific Market is likely to grow during 2017-2025 with number of market players expanding and emerging the business. The driving factors being the awareness and rise in cancer risks and low cost surgeries. The growing government support in New Zealand, Australia, South Korea and Taiwan will boost the market growth of patient temperature management technique.

COMPETITIVE INSIGHTS

The major players in the market include the 3M Company (US), Smiths Group plc (US), Medtronic plc (Covidien plc (Ireland)), Stryker Corporation (US), C. R. Bard, Inc. (US), ZOLL Medical Corporation (US), Geratherm Medical AG (Germany), Inditherm Plc (UK), and Cincinnati Sub-Zero Medical Division (US). Companies are forming alliances and are going for mergers and acquisitions to strengthen their market position.

Organizations are investing in research and development to come up with novel and innovative products that will capture new market share.

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